

WEATHERIZATION DEFERRAL FORM

Client: _____ Phone: _____
Address: _____ City: _____

☐ **APPLIANCE NEEDS
IMMEDIATE SERVICE**

[A] Health & Safety problems marked/described below prevent installation of conservation measure(s).

☐ **Malfunctioning combustion appliance(s) present with a condition requiring immediate service:**

☐ Furnace/Heater, ☐ Water Heater, ☐ Range/Oven, ☐ Clothes Dryer, ☐ _____

☐ **Extensive repair of structure or mechanical systems is required that exceeds program limits:**

☐ Structure, ☐ Plumbing, ☐ Electrical, ☐ Heating, ☐ Other: _____

☐ **Sanitation problems are present which could endanger the weatherization crew:**

☐ Sewage, ☐ Other: _____

☐ **Severe moisture problems are present:**

☐ Structure, ☐ Crawl Space, ☐ Attic, ☐ Other: _____

☐ **Harmful pesticide residue, and/or** ☐ **Dangerous pest/insect infestation—is present in:**

☐ Dwelling, ☐ Yard, ☐ Crawl Space, ☐ Attic, ☐ Other: _____

☐ **Home is pre-1978, and excessive peeling paint is present in the following location(s):**

☐ Interior Work Area, ☐ Exterior Work Area, ☐ Other: _____

☐ **Other:** _____

[B] Additional description of problem(s): _____

[C] Measures that cannot be installed now: ☐ All / ☐ Some, which are: _____

[D] Measures which cannot be installed now can possibly be installed after problems have been corrected. The Weatherization Agency: ☐ cannot assist / ☐ will assist—by referring to other programs/agencies, and/or:

☐ Other: _____

[E] Responsibilities of property owner: _____

CLIENT ACKNOWLEDGMENT: I/we have read (or had explained) the contents of this form and understand that: (1) the health and safety problems listed above prevent installation of some or all conservation measures at this time; (2) program limitations prevent the Weatherization Agency from correcting the problem(s); and (3) after responsibilities of the property owner listed in [E] have been met, all measures for which the home qualifies may be installed.

☐ Owner, ☒ Tenant: X _____ Date: _____

☐ Landlord, ☐ Agent: X _____ Date: _____

To obtain information, and to report all problems have been corrected, contact the Weatherization Agency:

Agency: _____

Address: _____

Contact Person: _____ Phone: _____

Form completed by:
(Agency printed name & signature) X _____ Date: _____

INSTRUCTIONS FOR CSD WEATHERIZATION DEFERRAL FORM (CSD 542, 09/09/11)

1.1 COMPLETING THE FORM

Prior to explaining the problems and health and safety concerns that will delay installation of one or more weatherization measures, complete the Weatherization Deferral Form according to the following instructions:

1. Part [A]:
Check all applicable boxes, and write all needed notes, to describe the problems/conditions that preclude installation of one or more weatherization measures.
2. Part [B]:
When more space is needed to write descriptive details for a problem condition, make a note (such as “also see [B]”) and continue the description in Part [B].
3. Part [C]:
Indicate which measures(s) cannot be installed due to the existence of the described the problems/conditions.
4. Part [D]:
 - a. When assistance can be provided, indicate what action will be taken by the Agency to assist the client (e.g., referrals to other agencies/programs that may remedy problems or conditions), which may then make deferred weatherization services feasible.
 - b. In the unlikely event there is no way to provide assistance of any kind, check the applicable box and briefly describe why.
5. Part [E]:
Describe what the homeowner (or landlord/agent) must do in order for deferred weatherization services to become feasible.
6. Client Acknowledgement:
 - c. If owner-occupied, obtain the signature (and date) of an owner.
 - d. If a rental:
 - Obtain the signature (and date) of the head of the household.
 - Also obtain the signature (and date) of the owner or the landlord/agent.
7. Contact Information:
The bottom box must contain:
 - e. The Weatherization Agency’s contact information, including the name and phone number of the contact person.
 - f. The signature (and date) of the person completing the Form (preferably, this will also be the person who explains it).

1.2 EXPLAINING THE FORM

Prior to obtaining client signature(s) on the Deferral Form, weatherization personnel shall review it with the client(s) and explain each portion of it.

8. Part (A):
Point out the checked boxes, and explain any written notes that describe the problems/conditions which prevent installation of one or more weatherization measures.
9. Part (B):
Point out continued or additional descriptive notes, when Part [B] is used to provide more space to write.
10. Part (C):
 - g. When assistance can be provided, explain what action will be taken by the Agency to assist the client (e.g., referrals to other agencies/programs that may remedy problems or conditions), which may then make deferred weatherization services feasible.
 - h. In the unlikely event that there is no way to provide assistance of any kind, explain why.
11. Part (D):
 - i. Make sure the homeowner (or landlord/agent) is aware of exactly what they must do in order for deferred weatherization services to become feasible.
 - j. While doing that, attempt to also determine their intentions and timeline—whether or not they are likely to take the necessary action and, if so, when. (Lack of a commitment by the owner would suggest that this dwelling will probably never become a viable candidate for weatherization.)
12. Client Acknowledgement:
Make sure all responsible parties read (or have it read to them) and understand this section.
13. Contact Information:
Point out the Agency’s contact information, and explain how to inform the Agency when remedial action is complete.
 - k. Make it clear that, after remedial action is complete, the dwelling must then be re-evaluated for the possibility of installing deferred weatherization—if such services are then available.
 - l. Do not make promises or firm commitments for future weatherization, *unless* there is certainty that they can be fulfilled.